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MARKET REVIEW

Raw sugar prices, duty paid at New York, declined from 5.95 cents per pound during most of February to 5.90 cents toward the end of February and to 5.78 cents in mid-March. On March 24, they had recovered slightly to 5.85 cents.

Since February 21, the New York refined sugar price has been quoted at 8.55 cents. This 10-point reduction followed earlier developments in Chicago where prices of 8.20 cents for cane sugar and 8.00 cents for beet sugar have prevailed on a day-to-day basis even though quoted prices are 30 points higher.

In spite of the price reduction, which on some occasions in the past has acted as a spur to distribution, the weekly rate of sugar distribution continues to range between 140 and 150 thousand tons. Total deliveries from the beginning of the year through mid-March amounted to about 1,377 thousand tons; this is approximately the same as the 1950-1954 average for this initial 10-week period of the year, but less than deliveries in any one of the last three years.

In comparing this year with preceding years, one must bear in mind that price increases for refined sugar were announced on March 12, 1952, March 13, 1953, and March 15, 1954. While the full effect on distribution of these announcements was felt during subsequent days when buyers rushed to get sugar at the old, lower price, the expectation of the announcement of a price increase caused stepped-up deliveries even earlier. Moreover, in 1954, some southern refiners announced a price increase about a week before the New York announcement.

In the world market, the price reached the 3.25 cent level on March 21, which is the minimum of the equitable price range spelled out in the International Sugar Agreement, and on March 24 advanced further to 3.30 cents. Since December 10, 1954, the price had been below 3.25 cents. The return to the higher level may be explained as the somewhat delayed effect of substantial sales of Cuban sugar to the Soviet Union and to presently undisclosed buyers. When the sale to the U.S.S.R. of 227 thousand short tons of raw sugar was announced in February, the low contract price of 3.05 cents per pound tended to cancel the bullish effect which the announcement might have had. Subsequently, Cuban sales of approximately 240 thousand short tons to undisclosed buyers and of about 34 thousand short tons to the new

Government Export Bank (possibly for shipment to Yugoslavia) were announced. More recently, Mexico sold 18 thousand tons of refined sugar to the Soviet Union, and East Germany, ordinarily an exporter, bought two cargoes of South American sugar. The market began a gradual climb from a 3.15 cents low on March 7 to its present level.

PARTICIPATION BY PRIMARY DISTRIBUTORS
IN THE SUGAR MARKET

By

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This article presents a discussion of the participation of the two major primary distributors--cane sugar refiners and beet sugar processors--in the over-all domestic sugar market, and the shifts that have occurred in distribution patterns in the principal regions and States where beet and cane sugar meet in competition. In the 6-year period, 1949-1954, there has been little over-all change in relative participation in the United States sugar market; however, the several large beet crops in recent years resulted in a slight gain in the proportion of beet deliveries to total deliveries for the period as a whole. Shown below are the percentages of total deliveries supplied by these two major primary distributors during the period:

<u>Year</u>	<u>Refiners</u>	<u>Beet processors</u>
1949	71.8	19.6
1950	71.1	21.1
1951	69.8	22.3
1952	72.2	19.3
1953	71.1	20.6
1954	69.7	22.0

The population of the United States has been increasing steadily at a rate of about 2.5 million persons annually. Latest data made available by the Bureau of Census reveal that the total population increased from 148,700,000 in 1949 to 161,200,000 in 1954, a gain of 8.4 percent ^{1/}. Each State and the District of Columbia, with the exception of New Hampshire, had a larger population in 1954

^{1/} Includes persons in the Armed Forces stationed in each State.

than in 1949.(Figure 1). The most rapid growth occurred in the Mountain and Pacific States, the major beet sugar producing areas, and in Florida, mainly as a result of interstate migration. The largest actual gain in any single State between 1949 and 1954 was 2, 217, 000 persons in California, an increase of 21 percent.

Total annual distribution of sugar during the period ranged from a low of 7, 580, 000 short tons, raw value, in 1949, to a high of 8, 485, 000 tons in 1953. With per capita consumption relatively constant, increases in distribution mainly reflect population gains although there were other factors which made for irregularities in distribution from one year to another. For example, in 1950, the hoarding movement brought about by the Korean situation resulted in total deliveries of 8, 279, 000 tons. On a per capita basis, this amounted to 102.2 pounds (refined basis), the highest during this 6-year period. The resulting build-up of inventories occasioned a decrease in total distribution to 7, 737, 000 tons in 1951 when per capita deliveries dropped to 94.3 pounds, the lowest of the period. In 1953, because of large beet sugar constructive marketings, and stock piling because of strike threats on the East Coast, total deliveries rose to 8, 485, 000 tons and per capita deliveries to 100.0 pounds.

The relative positions of refiners and beet processors show considerably more variation when deliveries are examined on a State or regional basis than on an over-all basis. Table 1 shows the per capita distribution of sugar and the percentages of total distribution supplied by refiners and beet processors in selected States in 5 regions for the 1949-54 period. States in the East North Central, West North Central, West South Central, Mountain, and Pacific regions are depicted because they represent the major areas in which beet and cane sugar compete for markets.

The greatest shifts in deliveries from year to year between refiners and beet processors occurred in the East North Central region. In that region, the proportion of beet to total deliveries increased from 29.3 percent in 1949, when total beet marketings were relatively small, to 37.6 percent in 1951, when beet marketings were relatively large. Beet deliveries dropped to 27.3 percent in 1952 when total beet marketings declined, but had climbed to 36.9 percent of the total by 1954 as total beet deliveries increased. Beet sugar deliveries in this region varied in direct relationship with the size of the beet crop while deliveries by refiners varied inversely. Of particular interest is the shift in the relative positions of refiners and beet processors in Illinois where per capita distri-

**FIGURE 1. PERCENTAGE CHANGE IN POPULATION
BY STATES, 1949 TO 1954**

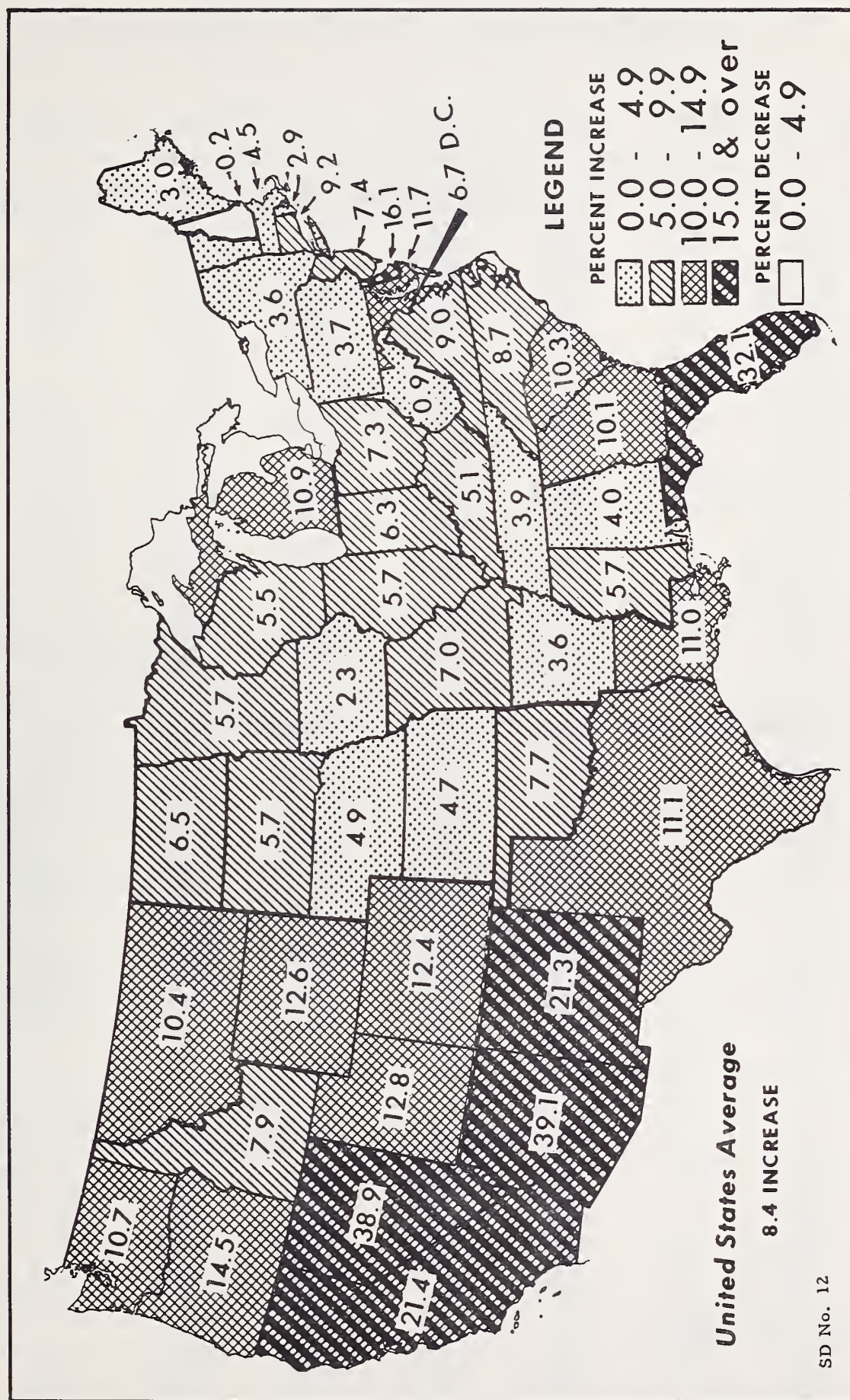


Table 1.- Per capita distribution of sugar, and percentages of total supplied by cane sugar refiners and beet sugar processors in selected states, 1949 - 1954

State and region	Years					
	1949	1950	1951	1952	1953	1954
Per capita distribution of sugar, pounds, refined						
EAST NORTH CENTRAL						
Ohio	82.2	91.5	77.6	83.0	84.8	83.5
Indiana	84.9	97.0	84.0	92.0	101.7	98.2
Illinois	153.6	166.1	145.1	150.0	170.0	141.3
Michigan	74.8	81.1	74.4	72.9	71.8	69.6
Wisconsin	88.4	96.8	82.8	84.1	90.1	86.8
Average	102.1	112.0	97.5	101.2	108.8	99.1
WEST NORTH CENTRAL						
Minnesota	77.0	90.6	80.3	85.3	86.9	75.9
Iowa	74.9	84.4	75.1	81.4	81.3	78.7
Missouri	109.2	116.3	104.7	108.0	105.7	92.2
North Dakota	64.6	69.3	57.6	61.3	60.1	58.2
South Dakota	65.4	70.4	66.1	67.9	67.1	61.5
Nebraska	72.6	82.9	75.3	92.4	106.0	114.2
Kansas	55.9	67.1	63.6	65.3	68.4	70.3
Average	81.2	90.8	81.8	87.0	88.4	82.4
WEST SOUTH CENTRAL						
Oklahoma	65.9	66.2	63.0	64.0	65.4	65.7
Texas	85.8	91.2	84.0	83.3	84.4	82.5
Average	81.5	85.6	79.4	79.2	80.4	79.0
MOUNTAIN						
Montana	63.3	69.3	59.0	63.5	59.3	57.4
Idaho	63.1	65.9	60.8	65.0	59.1	57.4
Wyoming	44.5	52.6	45.9	56.1	47.6	49.4
Colorado	73.5	79.1	73.5	73.7	80.3	73.0
New Mexico	39.8	40.3	39.1	37.4	36.6	37.4
Arizona	51.5	50.9	46.4	47.6	48.3	45.6
Utah	92.5	94.0	90.9	84.7	87.1	80.3
Nevada	41.8	43.4	42.3	45.2	40.8	36.4
Average	63.4	66.5	61.4	62.1	62.0	58.4
PACIFIC						
Washington	102.5	108.2	101.2	111.4	104.9	91.2
Oregon	118.1	103.5	102.4	101.9	103.8	96.5
California	107.8	113.5	117.3	115.1	119.7	111.1
Average	108.0	111.6	113.2	113.1	115.9	106.7
UNITED STATES AVERAGE	95.3	102.2	94.3	97.0	100.0	95.1
Percentage of total supplied by cane sugar refiners						
EAST NORTH CENTRAL						
Ohio	82.7	80.0	77.8	86.5	86.2	85.8
Indiana	83.9	79.7	80.7	90.2	87.0	76.6
Illinois	52.2	53.6	48.6	56.3	48.3	43.2
Michigan	46.3	41.8	35.8	43.3	43.3	40.6
Wisconsin	56.6	58.4	52.2	54.8	51.3	47.0
Average	61.9	60.8	56.6	64.7	60.3	56.9
WEST NORTH CENTRAL						
Minnesota	19.3	20.0	19.3	19.5	18.9	20.4
Iowa	37.5	38.5	35.7	35.6	37.0	36.3
Missouri	62.6	59.0	56.9	64.5	65.9	68.6
North Dakota	9.2	5.8	4.7	8.3	9.7	9.6
South Dakota	6.7	6.7	7.1	6.7	7.4	7.8
Nebraska	14.7	15.1	13.2	12.0	12.7	11.5
Kansas	28.1	33.7	28.7	27.9	31.9	29.4
Average	38.4	37.2	35.3	37.2	38.0	37.7

Table 1.- Per capita distribution of sugar, and percentages of total supplied by cane sugar refiners and beet sugar processors in selected states, 1949 - 1954(Cont.)

State and region	Years					
	1949	1950	1951	1952	1953	1954
Percentage of total supplied by cane sugar refiners (Cont.)						
WEST SOUTH CENTRAL						
Oklahoma	72.6	71.4	71.0	73.0	72.9	70.4
Texas	83.7	80.1	80.5	83.8	81.8	79.5
Average	81.7	78.6	78.8	82.0	80.2	77.9
MOUNTAIN						
Montana	9.4	7.1	7.0	7.0	5.1	5.8
Idaho	14.4	14.3	13.8	13.5	15.8	14.7
Wyoming	11.8	10.2	10.0	21.4	10.0	8.2
Colorado	10.2	8.8	8.6	8.5	7.9	8.9
New Mexico	37.6	33.7	32.2	32.8	35.9	35.5
Arizona	61.6	56.8	62.7	64.1	66.2	62.9
Utah	9.8	9.4	9.1	9.3	14.7	12.0
Nevada	64.8	68.3	62.7	63.2	70.4	71.7
Average	20.1	18.1	18.7	19.9	21.1	20.8
PACIFIC						
Washington	37.5	28.5	26.2	31.7	28.6	25.2
Oregon	43.2	32.3	31.6	30.5	26.8	26.8
California	45.9	47.0	47.4	50.8	51.7	46.9
Average	44.3	42.6	42.8	46.0	46.3	42.3
UNITED STATES AVERAGE	71.8	71.1	69.8	72.2	71.1	69.7
Percentage of total supplied by beet sugar processors						
EAST NORTH CENTRAL						
Ohio	6.9	12.4	15.9	3.3	5.3	7.7
Indiana	11.7	18.5	15.8	6.5	10.4	17.8
Illinois	37.3	39.6	44.9	36.5	44.3	50.3
Michigan	42.6	52.8	56.8	42.3	40.9	51.6
Wisconsin	41.2	40.0	45.7	43.3	46.9	50.8
Average	29.3	33.5	37.6	27.3	31.9	36.9
WEST NORTH CENTRAL						
Minnesota	80.4	79.8	80.3	80.5	80.9	79.6
Iowa	61.5	61.2	63.6	63.9	62.7	63.1
Missouri	36.1	39.0	42.6	34.5	33.4	30.4
North Dakota	90.8	94.2	95.3	91.7	90.3	90.4
South Dakota	93.3	93.3	92.9	93.3	92.6	92.2
Nebraska	84.1	84.5	86.4	87.8	87.0	88.4
Kansas	71.4	65.9	70.9	71.8	67.7	70.4
Average	60.7	61.9	64.3	62.2	61.6	61.9
WEST SOUTH CENTRAL						
Oklahoma	27.1	28.3	28.6	26.4	26.7	29.2
Texas	11.1	13.9	17.0	10.2	13.8	17.1
Average	13.9	16.4	19.0	13.0	16.0	19.2
MOUNTAIN						
Montana	90.6	92.9	93.0	93.0	94.9	94.2
Idaho	85.6	85.7	86.2	86.5	84.2	85.3
Wyoming	88.2	89.8	90.0	78.6	90.0	91.8
Colorado	89.8	91.0	91.2	91.3	92.0	90.9
New Mexico	62.4	66.3	67.8	67.2	64.1	64.4
Arizona	38.0	43.2	37.3	35.9	33.8	37.1
Utah	90.2	90.6	90.9	90.7	85.3	88.0
Nevada	35.2	31.7	37.3	36.8	29.6	28.3
Average	79.9	81.9	81.3	80.1	78.9	79.2
PACIFIC						
Washington	61.0	60.4	62.6	57.7	59.3	61.2
Oregon	52.2	53.0	55.1	53.6	57.2	54.8
California	53.8	52.9	52.0	48.7	47.7	52.9
Average	54.7	54.1	53.8	50.6	50.1	54.1
UNITED STATES AVERAGE	19.6	21.1	22.3	19.3	20.6	22.0

bution is very large because of industrial food processing concentration. The trend in annual per capita distribution in that State varied in about the same pattern as national per capita distribution; however, beet deliveries trended upward from 37.3 percent of the total in 1949 to 50.3 percent in 1954. Deliveries by refiners trended downward from 52.2 percent in 1949 to 43.2 percent in 1954. The increase in beet was not totally at the expense of refiners as deliveries by other primary distributors (importers of direct-consumption sugar) dropped also.

In the Mountain States, a major beet producing region, little change occurred in the relative positions of refiners and beet processors during the period. As previously mentioned, this is one of the areas with the largest population growth in recent years. Although some variations occurred from year to year in certain States, it appears that the two types of primary distributors shared the increased distribution occasioned by population increases. It should be noted, however, that beet processors have customarily supplied the bulk of sugar needs in this region.

In the West North Central region where in all States except Missouri beet processors are the major suppliers, there was little change in the region as a whole in the relative positions of refiners and beet processors. However, in Missouri there was a declining trend in per capita deliveries during the period and beet deliveries dropped in relation to total deliveries because of intensified competition by southern refiners. On the other hand, per capita distribution rose in Nebraska during the period and the relative position of beet processors improved somewhat in that State.

Some significant shifts have occurred in the Pacific Coast States, another major beet producing area, and also an area characterized by a rapid population growth. In the region as a whole, beet deliveries as a percent of total declined from 1949 to 1953. Even though total deliveries of beet sugar increased in the region, these were proportionately less than the increases in deliveries by other primary distributors. This trend was reversed in 1954 when beet sugar regained the relative position it held at the beginning of the period. It should be noted, however, that in 1949 a favorable marketing situation existed for beet sugar in that less than the usual amount of Hawaiian sugar was marketed because of a longshoremen's strike in the Islands which tied up shipping. The major reason for the increase in 1954 was a significant gain of 5.2 percentage points in California, the largest State in the region with the greatest per capita

distribution of sugar. Per capita distribution in California showed a tendency to increase during the period regardless of the national pattern of total distribution, which probably reflects the rise in industrial activity in that State.

Deliveries by cane refiners in the Pacific region tended upward during the period through 1953. Although deliveries by refiners declined in relation to the total in Washington and Oregon because importers of Philippine direct-consumption sugar regained and surpassed their pre-war positions in those States, gains by refiners in California from 1949 to 1953 more than offset such losses. These gains reflect a partial recovery by refiners of the relative position held prior to the unfavorable marketing situation in 1949 referred to above. In 1954, the relative position of refiners dropped in the Pacific region primarily because of increased beet deliveries in California in that year.

In Summary, the large beet crops in recent years have resulted in a slight gain in relative deliveries of beet sugar in the 1949-1954 period. Although the change in relative participation by beet processors and refiners was small in the over-all sugar market, greater changes are apparent and certain shifts in delivery patterns occurred during the period in the major regions and States where cane and beet sugar compete. In the Mountain region, beet processors maintained their relative position without appreciable gain or loss. In the Pacific region, beet deliveries as a percent of total deliveries declined somewhat from 1949 to 1953, but recovered in 1954. Deliveries by refiners in that region showed a tendency to increase in relation to the total during most of the period because of gains in California, even though importers of Philippine direct-consumption sugar improved their relative position in Washington and Oregon. The greatest variability in delivery patterns occurred in the East North Central region where the relative positions of beet processors and refiners expanded and contracted directly and inversely, respectively, with the size of the beet crop.

SUGAR ACT OF 1948 - ADMINISTRATIVE ACTION

Date announced

Administrative action

March 24, 1955

Determination of minimum wage rates for 1955 sugar beet crop in districts other than California and nearby sugar beet producing localities. The determination pro-

Date announcedAdministrative action

March 24, 1955
(continued)

vides the same rates as those for the 1954 crop.

A public hearing on the 1955 wage rates was held in 5 cities of the sugar beet producing area during November and December 1954.

STATISTICAL SERIES IN THIS ISSUEHIGHLIGHTS

1. February deliveries of sugar for United States consumption 556,000 short tons (preliminary), 3,000 tons less than deliveries for February 1954. Beet processors' total deliveries up 19,000 tons, refiners and mainland sugarcane mills down 15,000 and 7,000 tons, respectively. Deliveries for U.S. consumption during the months January-February 1955, 1,123,000 tons, 60,000 larger than for the corresponding period of 1954. Beet processors' total deliveries were up 38,000 tons; refiners', 10,000 tons; and importers' deliveries were up 14,000 tons; total deliveries by mainland cane mills were down 2,000 tons.
2. Stocks of sugar held by primary distributors on February 26, 1955, 1,872,000 tons (preliminary), 320,000 tons larger than on February 28, 1954, but 17,000 tons smaller than on January 31, 1955. Beet processors' stocks, 1,226,000 tons, 159,000 larger than on February 28, 1954, but 81,000 smaller than on January 31, 1955; refiners' stocks, 480,000 tons, about 91,000 tons larger than on February 28, 1954, and 59,000 tons larger than on January 31, 1955.
3. Charges to quotas during January-February 1955, 1,148,000 tons, 1.7 percent larger than during the corresponding period of 1954. Increases in charges to quotas were as follows: Mainland cane area, 46,000 tons, 40.4 percent (partly estimated);

domestic beet area, 40,000 tons, 21.3 percent; Republic of the Philippines, 35,000 tons, 47.7 percent; and "full duty" countries, 20,000 tons, 117.1 percent. Decreases in charges to quota were registered for Cuba, 92,000 tons, 19.0 percent; Puerto Rico, 29,000 tons, 35.8 percent; and Hawaii, 807 tons, 1.6 percent.

4. Charges to quotas for the first 16 days of March totaled 401,000 short tons, raw value.
5. Deliveries by States for January 1955 ranged from 6 to 20 percent larger in all geographic areas than in January 1954, except in the Western States where they were smaller by about 4 percent. Deliveries to New England were up 6 percent; to the Southern States about 12 percent; the Middle Atlantic States, 16 percent; and to the North Central States about 20 percent.
6. Deliveries of sugar during the third quarter of 1954 were 5.9 percent less than during the third quarter of 1953. Decreases were shown in deliveries to each category of buyers, except to buyers for non-food products which were 13 percent larger. Dextrose sales decreased 6.8 percent and were smaller for all types of buyers, except confectionery and related products (up 26 percent), and multiple and other food uses (up about 12 percent). Unmixed corn sirup sales averaged 3.7 percent larger.

Table 2.- Distribution of sugar by primary distributors in the continental United States, Puerto Rico, and Hawaii during January 1955 and 1954

	<u>1955</u> (short tons, raw value)	<u>1954</u> (short tons, raw value)
<u>Continental United States</u>		
Refiners' raw	45	140
Refiners' refined	410,384	384,899
Beet processors	110,440	91,669
Importers' direct-consumption	28,205	14,322
Mainland cane mills' direct-consumption	<u>20,438</u>	<u>15,334</u>
Total	569,512	506,364
Deliveries for export, livestock feed, etc.	2,468	2,121
For continental consumption <u>1/</u>	567,044	504,243
<u>Puerto Rico</u>	2,044	7,266
<u>Hawaii</u>	2,725	2,601

1/ Includes deliveries for United States military forces at home and abroad.

Table 3.- Stocks of sugar held by primary distributors in the continental United States, January 31, 1955 and 1954

	<u>1955</u> (short tons, raw value)	<u>1954</u> (short tons, raw value)
Refiners' raw	210,678	134,168
Refiners' refined	210,038	251,410
Beet processors	1,306,645	1,138,577
Importers' direct-consumption	26,547	15,374
Mainland cane mills	<u>135,502</u>	<u>68,260</u>
Total	1,889,410	1,607,769

Table 4.- Raw sugar: Refiners' stocks, receipts and meltings January 1955 1/

	(short tons, raw value)
Stocks January 1, 1955	249,840 <u>2/</u>
Receipts	404,226
Meltings	443,343
Deliveries for direct consumption	15
Stocks January 31, 1955	210,678

Source: Compiled from reports on Form SU-15A from cane refiners.

1/ For receipts by source of supply, see Table 8.

2/ Revised.

Table 5.- Refined sugar: Refiners' and processors' stocks, production and deliveries, January 1955

	Cane sugar (short tons, <u>1/</u>)	Beet sugar (raw value, <u>1/</u>)
Stocks January 1, 1955	185,983 <u>1/</u>	1,305,931 <u>1/</u>
Production	434,439	111,154
Deliveries	410,384	110,440
Stocks January 31, 1955	210,038	1,306,645

Source: Compiled from reports on Form SU-16A and SU-70 from cane sugar refiners and beet sugar processors, respectively.

1/ Revised.

Table 6.- Direct-consumption sugar: Importers' stocks, receipts and deliveries - January 1955 1/

	(short tons, raw value)
Stocks January 1, 1955	23,310 <u>2/</u>
Receipts	31,442
Deliveries	28,205
Stocks January 31, 1955	26,547

Source: Compiled from reports on Form SU-15B from importers of direct-consumption sugar.

1/ For receipt by source of supply, see Table 8. 2/ Revised.

Table 7.- Mainland sugarcane mills' stocks, production and deliveries of sugar - January 1955

	(short tons, raw value)
Stocks January 1, 1955	178,438
Production	38,111
Deliveries	
For further processing	60,609
For direct-consumption	<u>20,438</u>
Total	81,047
Stocks January 31, 1955	135,502

Source: Compiled from reports submitted by mainland sugarcane processors and processor-refiners.

Table 8.- Refiners and importers: Receipts by source of supply

Source of Supply	Refiners (raw sugar)	Importers (d. c. sugar)
(short tons, raw value)		
Cuba	261,625	17,619
Hawaii	12,408	1,873
Mainland cane area	53,528	-
Philippines, Republic of	59,035	-
Puerto Rico	17,543	8,292
Virgin Islands	-	-
Other countries	78	3,658
Not identifiable	9	-
Total	404,226	31,442

Table 9.- Distribution of sugar by primary distributors in the continental United States, February and Jan.-Feb., 1955 and 1954

	1955 1/ <u>February</u> <u>Jan.-Feb.</u>		1954 <u>February</u> <u>Jan.-Feb.</u>	
	(short tons, raw value)			
Refiners	402,278	812,707	417,581	802,620
Beet processors	119,885	230,325	100,485	192,154
Importers	32,410	60,615	32,248	46,570
Mainland cane mills	<u>3,817</u>	<u>24,255</u>	<u>10,887</u>	<u>26,221</u>
Total	558,390	1,127,902	561,201	1,067,565
Deliveries for export, livestock feed, etc.	2,020 ;	4,488	2,378	4,499
For continental con- sumption 2/	556,370	1,123,414	558,823	1,063,066

1/ Preliminary. 2/ Includes deliveries for U. S. military forces at home and abroad.

Table 10.- Stocks of sugar held by primary distributors in the continental United States, February 26, 1955 & February 28, 1954

	1955 1/ (short tons, raw value)	1954
Refiners' raw	225,153	125,193
Refiners' refined	254,968	263,381
Beet processors	1,225,555	1,066,825
Importers	39,323	32,660
Mainland cane mills	127,400 2/	64,277
Total	1,872,399	1,552,336

1/ Preliminary. 2/ Not available; estimated.

Table 11.- Status of 1955 sugar quotas as of February 28, 1955

Area	Quota	Credit for draw- back of duty	Charge to quota & offset to draw- back of duty 1/		Unfilled balance	
			Total	Direct consump- tion from offshore areas 2/	Total	Within dir- ect consump- tion limits for offshore areas
short tons, raw value						
Domestic beet	1,800,000	-	225,797	-	1,574,203	-
Mainland cane	500,000	-	160,727 3/	-	339,273	-
Hawaii	1,052,000	-	49,028	1,105	1,002,972	25,811
Puerto Rico	1,080,000	-	82,284	22,841	997,716	103,192
Virgin Islands	12,000	-	0	-	12,000	-
Republic of the Philippines	977,000	-	109,566	294	867,434	59,626
Cuba	2,667,840	160	483,999	40,170	2,184,001	334,837
Other foreign countries (see below)	<u>111,160</u>	<u>23</u>	<u>36,262</u>	<u>36,262</u>	<u>74,921</u>	<u>1,532</u>
Total	8,200,000	183	1,147,663	100,672	7,052,520	524,998
Foreign countries other than Cuba and Republic of the Philippines						
Dominican Republic	27,605	0	7,370	7,370	20,235)	
El Salvador	4,136	0	0	0	4,136)	
Haiti	2,671	0	0	0	2,671)	
Mexico	11,445	23	8,035	8,035	3,433)	1,532
Nicaragua	7,823	0	7,820	7,820	3)	
Peru	51,922	0	7,479	7,479	44,443)	
Unspecified countries (those without individual prorations)	<u>5,558</u>	<u>0</u>	<u>5,558 4/</u>	<u>5,558</u>	<u>0 5/)</u>	
Total	111,160	23	36,262	36,262	74,921	

Liquid sugar 6/

wine gallons of 72 percent total sugar content					
Cuba	7,970,558	-	2,586,232	-	5,384,326
Dominican Republic	830,894	-	4,127	-	826,767
British West Indies	300,000	-	0	-	300,000

1/ Charges to quota made upon marketing, entry, or certification for entry.

2/ Includes raw sugar for direct-consumption: Cuba 1,952; Puerto Rico 24; Republic of the Philippines 26.

3/ February portion estimated same as February 1954.

4/ Belgium 228; China (Formosa) 1,112; Costa Rica 939; Denmark 1,112; Hong Kong 9; Netherlands 1,112; Panama 1,046. Entered under Sec. 212, 10 tons each: Colombia, Federal Republic of Germany, and the United Kingdom. Canada entered 2 tons under Sec. 212.

5/ Applications being held pending availability of quota comprise: China (Formosa) 1,259; Colombia 1,169; Costa Rica 1,216; Denmark 42; Hong Kong 26; Netherlands 925; Total 4,647.

6/ 3,000 gallons entered by United Kingdom under Sec. 212.

Table 12.- Comparison of charges to quota and offsets to drawback of duty 1/
January - February 1954 and 1955

(Short tons, raw value and percentage)

Area	1954	1955	Increases		Decreases	
	Tons	Tons	1954 to 1955	Percent	1954 to 1955	Percent
			Tons		Tons	
Domestic beet	186,072	225,797	39,725	21.3	-	-
Mainland cane	114,441 ^{2/}	160,727 ^{3/}	46,286	40.4	-	-
Hawaii	49,835	49,028	-	-	807	1.6
Puerto Rico	111,708	82,284	-	-	29,424	35.8
Virgin Islands	0	0	-	-	-	-
Republic of the Philippines	74,166	109,566	35,400	47.7	-	-
Cuba	576,038	483,999	-	-	92,039	19.0
Other foreign countries (see below)	16,703	36,262	19,559	117.1	-	-
Total	1,128,963	1,147,663	18,700	1.7	-	-
Foreign countries other than Cuba and Republic of the Philippines						
Dominican Republic	0	7,370				
El Salvador	0	0				
Haiti	2,441	0				
Mexico	3,238	8,035				
Nicaragua	2,387	7,820				
Peru	3,473	7,479				
Unspecified countries (those without individual prorations)	5,164	5,558				
Total	16,703	36,262	19,559	117.1		

Liquid sugar

wine gallons of 72 percent total sugar content

Cuba	2,257,300	2,586,232	328,932	14.6
Dominican Republic	0	4,127	4,127	-
British West Indies	0	0	-	-

1/ Charges to quota made upon marketing, entry, or certification for entry.2/ Revised.3/ February estimated same as February 1954.

Table 13.- Status of 1955 sugar quotas as of March 16, 1955

Area	Quota	Credit for draw- back of duty	Charge to quota & offsets to draw- back of duty 1/		Unfilled balance	
			Total	Direct consump- tion from offshore areas 2/	Total	Within dir- ect consump- tion limits for offshore areas
short tons, raw value						
Domestic beet	1,800,000	-	310,509	-	1,489,491	-
Mainland cane	500,000	-	176,300	3/ -	323,700	-
Hawaii	1,052,000	-	66,559	4,006	985,441	25,610
Puerto Rico	1,080,000	-	137,333	30,265	942,667	95,733
Virgin Islands	12,000	-	-	-	12,000	-
Republic of the Philippines	977,000	-	147,321	268	829,679	59,608
Cuba	2,667,840	160	673,392	73,069	1,994,608	301,914
Other foreign countries (see below)	<u>111,160</u>	<u>23</u>	<u>37,732</u>	<u>37,732</u>	<u>73,451</u>	<u>62</u>
Total	8,200,000	183	1,549,146	145,340	6,651,037	482,927
Foreign countries other than Cuba and Republic of the Philippines						
Dominican Republic	27,605	0	8,166	8,166	19,439)
El Salvador	4,136	0	0	0	4,136)
Haiti	2,671	0	0	0	2,671)
Mexico	11,445	23	9,276	9,276	2,192)
Nicaragua	7,823	0	7,820	7,820	3)
Peru	51,922	0	6,912	6,912	45,010)
Unspecified countries (those without individual prorations)	<u>5,558</u>	<u>0</u>	<u>5,558</u>	<u>4/ 5,558</u>	<u>0</u>	<u>5/)</u>
Total	111,160	23	37,732	37,732	73,451	62

Liquid sugar 6/

	wine gallons of 72 percent total sugar content			
Cuba	7,970,558	-	4,085,353	3,885,205
Dominican Republic	830,894	-	4,127	826,767
British West Indies	300,000	-	0	300,000

1/ Charges to quota made upon marketing, entry or certification for entry.

2/ Includes raw sugar for direct-consumption: Cuba 3,320; Puerto Rico 35; Republic of the Philippines 44.

3/ Estimated.

4/ Belgium 228; China (Formosa) 1,112; Costa Rico 939; Denmark 1,112; Hong Kong 9; Netherlands 1,112; Panama 1,046. Entered under Sec. 212; Canada 2; Colombia, Federal Republic of Germany and the United Kingdom 10 tons each.

5/ Applications being held pending availability of quota comprise: China (Formosa) 1,259; Colombia 1,169; Costa Rico 1,216; Denmark 42; Hong Kong 34; Netherlands 935; Total 4,655. 6/ 6,200 gallons entered by United Kingdom under Sec. 212.

Table 14.- Deliveries of sugar by primary distributors by states
Calendar Year 1954 ^{1/}

State	Cane sugar refiners	Beet sugar processors	Importers of direct-consump- tion sugar	Mainland cane sugar mills	Total
100-pound bags, refined equivalent					
Ala.	2,261,201		1,650	80,279	2,343,130
Ariz.	284,585	167,994			452,579
Ark.	1,140,205	62,955		23,873	1,227,033
Calif.	6,544,402	7,374,572	31,792	567	13,951,333
Col.	95,007	966,040	628	662	1,062,337
Conn.	1,158,409		49,003	437	1,207,849
Del.	155,458		800		156,258
D. C.	660,649		31,798	1	692,448
Fla.	1,142,960		1,432,132	166,252	2,741,344
Ga.	4,000,653		777,172	1,568	4,779,393
Idaho	51,854	301,066			352,920
Ill.	5,594,765	6,508,590	51,615	794,960	12,949,930
Ind.	3,166,168	736,354	109,252	119,492	4,131,266
Iowa	752,931	1,308,912	7,600	5,896	2,075,339
Kans.	417,137	996,891		2,490	1,416,518
Ky.	2,015,648	1,000	47,547	100,311	2,164,506
La.	3,603,763			214,718	3,818,481
Maine	669,288		8,037		677,325
Md.	3,012,246		499,988		3,512,234
Mass.	4,755,570		164,620		4,920,190
Mich.	1,986,276	2,520,444	242,928	141,133	4,890,781
Minn.	480,124	1,874,064		1,607	2,355,795
Miss.	1,532,026			66,973	1,598,999
Mo.	2,629,322	1,164,850	5,600	31,881	3,831,653
Mont.	20,936	339,525			360,461
Nebr.	178,852	1,378,737		2,661	1,560,250
Nevada	56,919	22,508			79,427
N. H.	324,153		3,520		327,673
N. J.	6,405,724		152,367	1,838	6,559,929
N. Mex.	103,730	187,986	200		291,916
N. Y.	15,484,805	362,232	1,909,988		17,757,025
N. C.	2,816,169		832,584		3,648,753
N. Dak.	35,483	334,376			369,859
Ohio	6,126,921	547,915	295,861	173,292	7,143,989
Okla.	1,048,448	435,416		6,412	1,490,276
Ore.	423,304	866,153	290,410	1,127	1,580,994
Pa.	9,419,327	41,123	1,943,284	210	11,403,944
R. I.	575,059		3,500		578,559
S. C.	1,537,799		110,360		1,648,159
S. Dak.	32,022	377,931			409,953
Tenn.	3,043,208		32,705	122,231	3,198,144
Tex.	5,556,189	1,192,433	184,809	55,514	6,988,945
Utah	72,868	534,999			607,867
Vt.	223,132		76,401		299,533
Va.	2,161,871		803,090	4	2,964,965
Wash.	584,074	1,417,142	317,714		2,318,930
W. Va.	1,107,268	4,442	89,731		1,201,441
Wisc.	1,460,392	1,576,639		68,483	3,105,514
Wyo.	12,641	141,538			154,179
Total	106,921,941	33,744,827	10,508,686	2,184,872	153,360,326

^{1/} Data include revisions shown on Table 15.

Table 15-- Revisions in deliveries of sugar by importers of direct-consumption sugar by states, January to September 1954

State	Month				
	January	February	March	April	May
100-pound bags, refined equivalent					
Calif.				772	
Colorado				48	
Florida	79,061	128,991	150,996	104,454	103,426
Georgia				110,457	
Maryland		11,980		21,780	
Michigan				29,952	
New York				173,556	
Ohio				38,666	51,701
Oregon				27,744	
Penna.		126,631		264,789	
Wash.				25,945	
U.S. Total	267,009	606,707	1,046,134	974,947	1,097,846
	June	July	August	September	
Connecticut				3,740	
D. C.		4,996	3,800		
Florida	145,235				
Maryland		62,841	77,356		
Massachusetts		28,624			
Michigan		47,831	53,338		
New Jersey				16,289	
New York		225,501	218,750	194,341	
Ohio	41,492				
Washington		26,827	63,780		
U. S. Total	1,354,754	1,386,920	1,418,383	959,591	

Table 16.- Deliveries of sugar by primary distributors by states, January 1955

State	Cane sugar refiners	Beet sugar processors	Importers of direct-consump- tion sugar	Mainland cane sugar mills	Total
100-pound bags, refined equivalent					
New England					
Connecticut	86,677		4,175		90,852
Maine	47,289		181		47,470
Massachusetts	369,453		8,979		378,432
New Hampshire	22,585		500		23,085
Rhode Island	45,873		100		45,973
Vermont	14,015		9,000		23,015
Total	585,892		22,935		608,827
Mid-Atlantic					
New Jersey	474,276		5,022		479,298
New York	1,180,448	29,332	126,932		1,336,712
Pennsylvania	666,247	2,200	85,929	25	754,401
Total	2,320,971	31,532	217,883	25	2,570,411
North Central					
Illinois	291,652	531,182		109,771	932,605
Indiana	221,388	50,151	300	15,196	287,035
Iowa	49,434	81,228			130,662
Kansas	26,302	49,543		4,570	80,415
Michigan	153,340	212,343	7,012	800	373,495
Minnesota	27,329	89,962			117,291
Missouri	127,097	72,083		9,497	208,677
Nebraska	18,722	69,785		600	89,107
North Dakota	1,903	19,230			21,133
Ohio	447,475	35,162	5,213	16,617	504,467
South Dakota	2,544	18,826			21,370
Wisconsin	71,081	66,630		4,970	142,681
Total	1,438,267	1,296,125	12,525	162,021	2,908,938
Southern					
Alabama	142,550			10,336	152,886
Arkansas	71,232	6,000		6,387	83,619
Delaware	11,160				11,160
Dis. of Col.	41,301		2,300		43,601
Florida	101,207		141,280	66,711	309,198
Georgia	349,315		9,485	54	358,854
Kentucky	155,194		3,792	9,983	168,969
Louisiana	251,580			34,948	286,528
Maryland	224,753		16,337		241,090
Mississippi	98,008			9,652	107,660
North Carolina	232,881		31,356	1	264,238
Oklahoma	72,107	27,140		2,945	102,192
South Carolina	129,304		2,022		131,326
Tennessee	205,584		1,111	3,239	209,934
Texas	449,997	72,721		80,142	602,860
Virginia	140,036		42,839		182,875
West Virginia	63,564	340	2,065		65,969
Total	2,739,773	106,201	252,587	224,398	3,322,959
Western					
Arizona	22,689	14,649			37,338
California	417,523	352,759	7,271		777,553
Colorado	7,214	48,552		600	56,366
Idaho	3,267	17,943			21,210
Montana	1,556	17,875			19,431
Nevada	5,043	2,629			7,672
New Mexico	7,033	11,634			18,667
Oregon	31,337	37,704	8,404		77,445
Utah	4,285	36,920			41,205
Washington	40,835	77,734	6,637		125,206
Wyoming	1,252	7,994			9,246
Total	542,034	626,393	22,312	600	1,191,339
GRAND TOTAL	7,626,937	2,060,251	528,242	387,044	10,602,474

Table 17.- Sugar deliveries, by type of product or business of buyer and by type of sugar, third quarter 1954 ^{1/}

UNITED STATES

Product or business of buyer	Beet	Cane	Imported D. C.	Liquid ^{2/}	Total Sugar
	100-pound bag refined				
Bakery, cereal and allied products	1,324,112	2,071,292	293,382	281,515	3,970,301
Confectionery and related products	586,340	1,311,302	634,423	574,771	3,106,836
Ice cream and dairy products	290,036	594,546	92,225	714,474	1,691,281
Beverages	364,452	1,931,881	693,489	1,649,219	4,639,041
Canned, bottled, frozen foods; jams, jellies and preserves	1,328,294	1,078,840	496,308	2,184,772	5,088,214
Multiple and all other food uses	179,147	609,211	30,031	390,451	1,208,840
Non-food products	2,921	133,990	136,730	27,915	301,556
Hotels, restaurants, institutions	17,666	98,826	5,881	8,161	130,534
Wholesale grocers, jobbers, sugar dealers	2,865,471	11,802,068	1,073,511	31,146	15,772,196
Retail grocers, chain stores, super markets	1,004,617	5,456,612	62,137	13,530	6,536,896
All other deliveries, including deliveries to Government agencies	132,903	308,146	15,275	5,971	462,295
TOTAL DELIVERIES	8,095,959	25,396,714	3,533,392	5,881,925	42,907,990
Deliveries in consumer-size packages (less than 100 lbs.)	2,130,018	13,025,011	197,833		15,352,862

^{1/} Represents approximately 98 percent of deliveries by primary distributors in continental United States.

^{2/} Refined equivalent.

Source: Reports of primary distributors of sugar to Sugar Division, CSS.

Table 18.- Sugar deliveries, by type of product or business of buyer, third quarter 1954 and percentage change from third quarter 1953

Product or business of buyer	United States	New England	Middle Atlantic	North Central	South	West
100-pound bag equivalent						
Bakery, cereal and allied products	3,970,301	141,959	1,215,428	1,283,092	731,265	598,557
Confectionery and related products	3,106,836	349,077	1,692,334	649,407	244,046	171,972
Ice cream and dairy products	1,691,281	100,798	486,043	503,145	356,657	244,638
Beverages	4,639,041	164,830	1,233,829	871,225	2,011,971	357,186
Canned, bottled, frozen foods; jams, jellies, preserves, etc.	5,088,214	141,041	845,441	744,387	600,937	2,756,408
Multiple and all other food uses	1,208,840	42,681	620,258	318,487	71,958	155,456
Non-food products	301,556	3,443	79,900	30,967	186,904	342
Hotels, restaurants, institutions	130,534	21,953	57,272	12,227	17,462	21,620
Wholesale grocers, jobbers, sugar dealers	15,772,196	763,325	2,287,730	4,948,657	5,766,438	2,006,046
Retail grocers, chain stores, super markets	6,536,896	430,588	1,534,014	1,736,424	1,893,092	942,778
All other deliveries, including deliveries to Government agencies	462,295	10,801	87,050	89,828	134,631	139,985
TOTAL DELIVERIES	42,907,990	2,170,496	10,139,299	11,187,846	12,015,361	7,394,988
Percentage change from third quarter 1953						
Bakery, cereal and allied products	- 2.0	- 11.0	- .1	- 9.9	✓ 2.6	✓ 11.1
Confectionery and related products	- 14.9	✓ 2.3	- 5.8	- 40.2	- 5.4	✓ 1.4
Ice cream and dairy products	- .2	✓ .4	✓ 1.1	- 3.4	✓ 3.4	- 1.6
Beverages	- 8.1	- 22.4	- 8.9	- 16.8	✓ 2.4	- 25.3
Canned, bottled, frozen foods; jams, jellies, preserves, etc.	- 5.5	- 1.7	- 2.6	- 5.3	- 3.8	- 7.1
Multiple and all other food uses	- 23.1	- 39.9	- 17.0	- 34.7	- 31.0	- 3.9
Non-food products	✓ 13.0	- 44.9	✓ 1.2	✓ 48.4	✓ 15.0	✓ 83.9
Hotels, restaurants, institutions	- 12.9	- 9.2	- 32.6	✓ 4.6	✓ 11.4	✓ 62.5
Wholesale grocers, jobbers, sugar dealers	- 4.3	✓ .3	- 6.4	- 11.6	✓ .8	✓ 2.9
Retail grocers, chain stores, super markets	- 1.7	- 2.2	- .9	- 6.2	✓ 3.9	- 4.4
All other deliveries, including deliveries to Government agencies	- 31.7	- 43.1	- 38.2	✓ 48.1	- 25.7	- 49.2
TOTAL	* 5.9	- 4.3	- 5.8	- 13.3	✓ .9	- 5.0

Table 19.- Deliveries of cane and beet sugar by primary distributors in consumer size packages (less than 100 lbs.) third quarter 1954

Area	Cane sugar	Beet sugar	Total
	(hundredweight refined)		
United States	13,222,844	2,130,018	15,352,862
New England	846,919		846,919
Middle Atlantic	2,987,159		2,987,159
North Central and West, combined*	4,357,047	2,066,392	6,423,439
South	5,031,719	63,626	5,095,345

*Combined to avoid disclosure of individual company data. Total distribution in consumer size packages in these areas: North Central 4,272,781; West, 2,150,658.

Source: Reports of primary distributors of sugar to the Sugar Division, CSS.

Table 20.- Corn sirup (unmixed) sales by type of product or business of buyer, third quarter, 1954

UNITED STATES		
Product or business of buyer	Third quarter 1954	Change from 3rd quarter 1953
	(cwt.)	(percent)
Bakery and allied products, cereal and cereal products	307,603	+3.3
Confectionery and related products	1,866,716	-0.7
Ice cream and dairy products	200,114	+21.2
Brewery and brewery supply houses	90,797	+2.0
Soft drinks	4,394	-21.8
Total beverages	95,191	+0.6
Canned, bottled, frozen foods; jams, jellies, preserves, etc.	740,464	+14.3
Blended sirups	647,423	+3.0
Miscellaneous food products	170,654	+9.5
Total multiple and all other products	818,077	+11.4
Non-food products	419,955	-2.7
Wholesale grocers, jobbers, sugar dealers	24,081	-22.1
TOTAL DOMESTIC SALES	4,172,201	+3.7
TOTAL DOMESTIC SALES, DRY BASIS*	3,350,277	

*Based on 43° sirup with average solids content of 80.3 percent.

Source: Corn refiners' reports to Price Waterhouse.

Table 21.- Dextrose sales, by type of product or business of buyer, third quarter 1954 and percentage change from third quarter 1953

Product or business of buyer	United States	New England	Middle Atlantic	North Central	South	West
Bakery, cereal and allied products	888,710	36,001	100-pound bag equivalent 186,758	360,456	211,908	93,587
Confectionery and related products	123,622	2,677	49,658	61,563	7,070	2,654
Ice cream & dairy products	83,411	2,593	16,367	30,010	25,695	8,746
Beverages	138,208	8,571	28,878	57,309	23,337	20,113
Canned, bottled, frozen foods; jams, jellies, preserves, etc.	191,271	1,110	20,895	35,064	15,570	118,632
Multiple and all other food uses	149,320	8,950	38,544	71,001	20,232	10,593
Non-food products	128,911	9,482	41,105	39,200	37,970	1,154
Wholesale grocers, jobbers, sugar dealers, retail grocers, chain stores, super markets	41,489	1,715	3,747	18,698	9,077	8,252
All other deliveries, including deliveries to Government agencies	20,721	962	5,858	8,794	2,952	2,155
TOTAL SALES	1,765,663	72,061	391,810	682,095	353,811	265,886

	Percentage change from third quarter 1953					
Bakery, cereal and allied products	- 7.2	- 11.6	+ 4.2	- 6.9	- 15.4	- 6.3
Confectionery and related products	+ 25.9	+ 98.1	+ 19.8	+ 32.7	+ 4.7	+ 20.7
Ice cream & dairy products	- .8	+ .8	- 5.0	+ 17.3	- 10.4	- 12.3
Beverages	- 14.4	- 8.8	- 16.4	+ 1.2	+ 10.6	- 59.5
Canned, bottled, frozen foods; jams, jellies, preserves, etc.	- 5.7	+ 14.9	- 11.3	+ 5.5	+ 11.8	- 9.6
Multiple and all other food uses	+ 11.7	+ 99.4	+ 34.6	+ .6	+ 23.5	- 22.5
Non-food products	- 20.6	- 9.2	+ 13.1	- 21.9	- 39.8	- 48.6
Wholesale grocers, jobbers, sugar dealers, retail grocers, chain stores, super markets	- 33.9	- 7.2	- 15.6	- 34.3	- 7.6	- 54.6
All other deliveries, including deliveries to Government agencies	- 33.4	+ 11.0	- 4.7	- 52.8	- 18.7	+ 18.1
TOTAL	- 6.8	- .9	+ 5.4	- 4.8	- 14.6	- 16.6

Table 22.- Range of polarization of bulk sugar shipments entered against 1954 quotas

Month, 1954	Area of origin					
	Hawaii		Puerto Rico		Cuba 1/	
	Low	High	Low	High	Low	High
degrees						
January	-	-	98.14	98.39	97.47	97.71
February	97.38	97.92	98.11	98.36	97.87	97.87
March	97.47	97.99	98.22	98.28	98.29	98.94
April	97.51	97.86	97.88	97.88	97.32	99.15
May	97.53	97.84	98.26	98.26	97.41	97.70
June	97.46	97.93	-	-	98.78	98.96
July	97.38	97.94	-	-	98.94	98.94
August	97.20	97.73	98.25	98.25	98.94	98.96
September	97.44	97.86	-	-	98.83	99.07
October	97.54	97.83	97.93	98.09	98.76	99.00
November	97.12	97.80	97.77	98.28	98.76	98.76
December	97.45	97.82	98.09	98.09	-	-

1/ Includes only those shipments identifiable as bulk (unbagged)

shipments on Form SU-3C.

Source: Reports of final outturn and polarization on Form SU-3C

from refiners.